



Jon P. Christensen  
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September 25, 2008

Mr. Bruce A. Fogelson  
Paramount Homes  
2731 N. Lincoln Ave.  
Chicago, IL 60614-2313

Re: U.S. Patent Application No. 09/885,970  
Filed: June 21, 2001  
For: Method and System for Creating Advertisement Books  
Our File No. 6040-80216

Dear Bruce:

Enclosed for your records are copies of the Response, which was filed in the U.S. Patent and Trademark Office on September 24, 2008 regarding the above-identified matter.

We will keep you advised of any substantive communications from the U.S. Patent and Trademark Office concerning this application. In the meantime, please feel free to contact us if you have any questions.

Very truly yours,

HUSCH BLACKWELL SANDERS LLP  
WELSH & KATZ

By

A handwritten signature in black ink, appearing to be 'JPC', written over a horizontal line.

Jon P. Christensen

JPC:gjo

Enclosures

6040-80216 fwd Response to OA to client.doc

COPY



AdBookOnline.com<sup>sm</sup>



Jean D. Janvier  
Patent Examiner  
Examining Group 3688  
U.S. Patent Office  
P.O. Box 1450  
Alexandria, VA 22313-0001

October 1, 2008

RE: Applicant: Bruce A. Fogelson Serial No.: 09/885,970 METHOD AND  
SYSTEM FOR CREATING ADVERTISING BOOKS aka  
www.AdBookOnLine.com - Attny Doc No.: 80216 – Personal Letter.

Dear Mr. Javier,

The purpose of this letter is to add to my file and assist you with your findings, along with the items recently submitted by my attorney. As per my personal letter of August 8, 2007, I am writing directly to address matters that may be considered outside the skills or levels, form, practice or observations of an ordinary artisan or the protocol of a typical patent prosecuting attorney. Thus, I am free, and even compelled in some cases, to speak for my self, where my attorney may not be practiced or able. Though I may touch on issues of a personal nature, from our call or the application history, I mean no offence and I would hope that I have not, nor that my letters would not prejudice you against my case. Thank you for our telephone interview of March 4, 2008, with respect to the above referenced patent pending file which I am just recently in receipt of (or I would have responded sooner). I must respectfully disagree with your interview summary as well as your overall conclusions to date. This is also addressed, below. In this letter I will address each of the following:

1. Interview Summary
2. Prosecution History
3. Practiced in the art (See also letter of 9-16-08 attached)
4. Uniqueness vs. Rothstein – US 2002/0188532

(Also see copy of letter of 9-14-08 Re found examples)

### **Interview Summary:**

To begin by stating “In general...” in your Interview Summary, as you began Mr. Janvier, is to vastly exclude the more specific discussions we had about your own personal understanding or lack of experience of the field of art which occupied most of our conversation. My invention does not describe an engineered innovation, such as a chemical compound, computer chip, or mechanical tool, nor is the community-group based not-for-profit world, which is the field in which my idea would be applied. Ad-Books and related publications by these groups are a charitable fund-raising tool, and the complex social interactions, are complicated and expensive to produce, particularly by charities and not-for-profits, who most often use member-volunteers, who publish only occasionally, are not in the regular or commercial publishing business, and certainly benefit from no known technology to automate, let alone share the tasks as contemplated by my “application service provider” (ASP) internet and computer based system which could serve even vast numbers of such groups simultaneously.

We agreed to discuss whether you were competent to understand this field, by way of analogy, such as the way a person who has only rented an apartment may be knowledgeable as someone who’d purchased a new home? Both may have housing, but the renter is understood to be ignorant in the home-buying field to be a “First-time home-buyer” and are even given special considerations due to their obvious ignorance and the opportunity to “step-up” to home-ownership. After using this analogy we discussed your own church, and, charity or not-for-profits, but quickly found that you only had your church which had only done one such “ad-book” and then only to celebrate the 100 year centennial of the church and you had not participated. I hope that I did not offend you when I half-jokingly explained that “...there are three types of groups who employ Ad-Books for fund-raising; #1 the type who use them regularly, though to great success but at high cost, great effort and difficulty and no known automation, #2 the type never use Ad-Books for lack of up-front cost, significant skill and effort (and no known technology, forms or tutorial) and #3 the type, like your church group who, I guess do so only once every 100 years or so....” Although conversational, I hope that you did not take that offence. It did not go without note that you were not in a position to know what was within the level of skill of an ordinary artisan in the charity “Ad-Book” field. You

did not express a working knowledge or understanding based on personal experience and you do not say whether or not you ever have contributed to the making of an Ad-Book or even placing an ad or laudable statement in any such not-for-profit publication. Since the application has been pending for some 7 years, I find that hard to believe, and I pointed out that, in my experience, I get more such solicitations than for my mortgages.

Since this is not a commercial business setting, and more of a local or experiential matter, which differ by types of groups, it would seem you were lacking experience of the types of not-for-profit groups who regularly rely on Ad-Books, such as schools, youth-groups, local teams, community groups, hospitals, political parties and candidates, associations, trades, unions, synagogues, and churches. In fact, as I explained, my vast experiences come from numerous Jewish charities, and many of my examples sent in have been derived from Jewish charities. To the best of my knowledge, Chicago is one of the most charitable Jewish communities in the U.S. per capita. It is my sincere hope that my more vast experience relayed to you has not prejudiced you against my application either by type or experience. But the fact remains that I have a vast experience and research in this field and your response was simply to ask why this was not any different from "selling apples or oranges to the group?". As you may live in or around Washington D.C. and some of those experiences may be based on political fundraising and ad-books, I suspect that you are either prevented or not involved locally. In fact, most people don't vote either.

I believe I answered your "apple/oranges" vast oversimplification by saying that a.) it involved automating the selling efforts of all the group-members, family and friends, of all sorts and sizes of "fruit" over months, automatically slicing them into fruit-salad, automatically placing them in financial order, binding them by a certain date with an introduction and cover, and then serving them all back to the same group, only then for each member to see where their slice of fruit was, in order of all the others who wanted to see their fruit as well as those of their other members, family and friends. That fails to fully plumb the depths of the invention, but it shows a.) the naïveté of the question and b.) that you failed to fully report this and the much more complex nature of my responses in your Interview Summary. That would include the mathematical analogies and the scope and scale of the value of the potential invention to the public.

While discussing my ideas by way of your limited church experience, as an example, I did conclude by saying that I do pray for my invention to be granted a U.S. Patent, not for my self, but for the hundreds of thousands of not-for-profit groups who would benefit from a patent, and whom, with out the protection of a U.S. Patent would never find the common method to unify. Again, I hope that my religious overtones have not prejudiced you against my application.

The Examiner did claim to have some expertise on advertising but seemed unable to distinguish from that experience in commercial advertising to this application in non-commercial, and a completely different sector of content, focus, utility and the economy. We never were able to get an explanation as to what expertise or training formed the basis of Mr. Janvier's education or experience in the field. And it would appear that nothing in the early years of this application's pending status was related, when he was an Assistant Examiner and had only issued patents in the fuel industry and none in the ad-industry. More on that below.

### **Prosecution History:**

It is particularly unusual that the application history has been pending so long, yet still focus on the vague and subjective reason for rejection as to obviousness over one patent. I frame this point in terms of information on the examiner, now available thanks to the "internet age". My patent has been pending since 6/21/01 or 7 ¼ years or about 2,645 days. On-line internet sources now afford applicants a view of the examiner's history like never before. So by contrast, I now know that Examiner Janvier's USPTO career history is just about as old and with 7 patents as an Assistant Examiner with an average approval time of 3 ½ years or 1,339 days and as a Primary Examiner, 21 patents with an average approval time of 4 ¼ years or 1,631 days. Thus not only has my patent been taking 97% to 62% longer, but it would appear that this patent application was among the very first that Examiner Janvier had on his desk to review! Public accounts show Assistant Examiner Janvier's first issued patent #6332128 was granted 12/18/01, less than a month from my application. It seems that Examiner Janvier's last patent as and Assistant was 8/17/04 and in that time all 7 of his issued patents were regarding **fuel** and related matters. The fuel related patents carried on to then Primary Examiner

Janvier's first issued patent of 4/26/05 # 6885996. By this time, my patent was already over 1,400 days old! It would seem that some 6 or 7 of Mr. Janvier's 28 issued patents do relate to internet advertising, all coming much later, but some of these issued patents may in fact show a prejudice against my patent, or a pattern and practice that is inconsistent with the examination afforded to my pending application. If, for some reason, my patent would pre-date these much more recent patents issued, then I do not know how that would prejudice the examiner from issuing my much earlier filed application. As my attorney will show under separate cover, and I will attest, my work on invention dates back to Mid-1999, and had my file been attended to sooner then my information would have been provided sooner. Letting my application languish has prejudiced my application by the normal attrition of files and personnel, transfer of data-systems and just plain old dust. Also, the review by the examiner of a patent 7 years after filing, and only after a later career of examining in a related field, could prejudice against a more early understanding of what may now be considered well within the level of skills of an ordinary artisan. Would the same idea be considered WELL within the Skills of an ordinary artisan 7 years ago, when filed. Or even back in 1999 when it was documented and invented. It should be noted that Examiner Janvier's internet patents have been issued over inconsistent periods of time, but those that have been issued are far more general and technical than my application, which, by its very nature has a social-networking aspect and a file history clearly directed to the a-typical field of not-for-profit or charitable groups, as discussed above.

**Practiced in the art:**

I believe that I have provided testimony in our phone interview of another type of analogy for my field of invention that is parallel for one within the Skills of an ordinary artisan. We discussed the analogy of "Stage-Bill" or "Play-Bill" such as those handed out for free when one goes to the theatre. These too are printed by one or two firms for both commercial and community theatres – profit and non-profit alike. In fact, one of the founders of the industry for "Stage-Bill vs Show-Bill" has testified to me that as the first, oldest and largest printer of community Ad-Books in Chicagoland, he considers this matter to be completely novel and an a potentially exciting revolution to the ad-book and

ad-book printing industry! A copy of his remarks and technical comments to me are being provided by separate cover-letter dated 9-16-08. My point here, is that, with all due respect, my Examiner failed to see the analogy or understand the business model of semi-custom and private in-house distribution as opposed to general or commercial publication, or even the general field of commercial printing. Enclosed please see my letter of 9/16/08 with the remarks of Lew and Ira Saltzman of Saltzman Printing. I hereby attest that these are true and correct as presented.

**Uniqueness vs. Rothstein – US 2002/0188532:**

Even to this day, 7 years or more after filing, I can find no competition or idea that is related to my proposed business methods. Now, 7+ years later we, the public, have the benefit of searching by more powerful tools such as Google.com and Google.com even has a search by Patents sub-section. My search of key words on the subject of my invention or field finds no automated vendor in the field, and not even a remote competitor. I have recently posted my own [www.AdBookOnLine.com](http://www.AdBookOnLine.com) site for information proposes only and in hopes to begin to launch my business. A copy is attached for the file and for your review. The Examiner has failed to show any published example, old or new, that relates to my application, and this fact is significant by its absence. In fact, even web-site reviews which by their nature rank findings, to not show Rothstein – US 2002/0188532 on a list of related patents or ideas. This makes it difficult for us to argue over a citation that is not even considered with the top 100 findings for related art. I will leave that to my attorney and ask that you afford us due consideration. Not only do I now find that my Ad-Book idea pre-dates Rothstein, but to this date, Rothstein – US 2002/0188532 is not even considered comparable by any imperial on-line algorithm or search engine criteria I have perused. For the examiner to suggest that Rothstein – US 2002/0188532 is relevant makes it hard to refute if, in fact, there is no imperial source that draws such a comparison. Other than to point this out, I leave it to my patent attorney to make the actual argument and to show my prior invention work.

I have enclosed my letter of September 14, 2008 relating to my prior work in creating my Ad-Book, but I believe that my patent attorney has submitted that recently with my more formal response. (See cover letter and Filing Info).

Please note that I have also enclosed a copy of my attorney's cover letter and a copy of the cover to the recent Patent Electronic Filing. I hope that these letters and our more formal response are conclusive in favor of my U.S. Patent Application No. 09/885970 filed June 21, 2001 and support further patents pending.

Thank you for taking the time to review the history of this application, including re-examining even our perspectives given these many years. I find it discouraging that you are unable to differentiate between ads placed in a commercial context from ads placed in the not-for-profit context of the claimed invention. Ads placed in the commercial context are clearly different than ads placed in the not-for-profit context. Ads placed in the commercial context are placed for commercial advantage, whereas ads placed in the not-for-profit context are placed in the context of a contribution where profit is not a significant consideration. I would think that you would appreciate this difference at least from the standpoint that your own church uses these concepts. I was reminded of this even more as I attended, yet again, another event which included an Ad-Book. Enclosed, to add to my examples, is the Ad-Book for the Friends of the Israel Defense Forces – Central Region. This dinner-event was attended by some 1,200 people (my best friend, being the group's president) on September 27, 2008 and the book was printed for this one-time-only distribution only to those attending the event and distributed at their dinner-seats. This is as far from a commercial printing example as I can imagine. In addition to the overall example, please note some of the many forward letters of congratulations including from U.S. Senators Barack Obama and Richard Durbin, Mayor Richard Daley of Chicago, U.S. House members Jan Schakowsky and Mark Kirk. Those letters knew that they were for publication in this Ad-Book. And all those involved knew fully well that this and any Ad-book (as defined) could never be confused with any other sort of print or publication type. I'm sure they only wish that they had a tool to broaden the reach of the Ad-Book as fund-raiser and help automate their efforts.

It is important for me, as applicant to get this patent, for the obvious good it will do for others. But it is otherwise important to complete the record with a thorough examination, so that if a final rejection is to result, then every item raised, including the personal and professional perspective of the examiner may be called into question in the event of an appeal. Each patent and each examiner share a unique history and



perspective. I know that you have given my application significant time and consideration, for which I am thus far respectfully waiting for your determination. I am available to speak on the phone again or to answer any further questions. Thank you for your consideration to date.

Sincerely,



Bruce A. Fogelson

Applicant / Inventor

BAF / ENCL

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P.S. Please note that my attorney's firm has recently merged and contact information may have changed. Also, Please note that, since the original filing I, Bruce A. Fogelson, have moved. My new residence is 1345 W. Wolfram, Chicago, IL 60657 and my phone is 773-716-6686 and my e-mail is now [BruceFogelson@Gmail.com](mailto:BruceFogelson@Gmail.com)

P.P.S. I am looking forward the new movie "Flash of Genius" coming to theatres this week about the 1960's "...Patent Inventor Robert Kearns takes on the Detroit automakers who he claims stole his idea for the intermittent windshield wiper...". I too am now involved in a case with another set of U.S. Patents, and as an inventor, I obviously empathize with the inventor. The public may understand or not understand the Inventor. But I do hope that they better appreciate the important role of the USPTO. Enjoy.

OCT 06 2008

**Acknowledgement Receipt**


The USPTO has received your submission at 17:01:24 Eastern Time on **24-SEP-2008**.

No fees have been paid for this submission. Please remember to pay any required fees on time to prevent abandonment of your application.

**eFiled Application Information**

EFS ID	3999464
Application Number	09885970
Confirmation Number	5291
Title	Method and system for creating advertisement books
First Named Inventor	Bruce A. Fogelson
Customer Number or Correspondence Address	24628
Filed By	Jon Christensen/Gloria OBannon
Attorney Docket Number	7272-80216
Filing Date	21-JUN-2001
Receipt Date	24-SEP-2008
Application Type	Utility under 35 USC 111 (a)

**Application Details**

Submitted Files	Page Count	Document Description	File Size	Warnings
80216resp.PDF	54	Amendment/Req. Reconsideration-After Non-Final Reject	2408583 bytes	 PASS

This Acknowledgement Receipt evidences receipt on the noted date by the USPTO of the indicated documents, characterized by the applicant, and including page counts, where applicable. It serves as evidence of receipt similar to a Post Card, as described in MPEP 503.

New Applications Under 35 U.S.C. 111

If a new application is being filed and the application includes the necessary components for a filing date (see 37 CFR 1.53(b)-(d) and MPEP 506), a Filing Receipt (37 CFR 1.54) will be issued in due course and the date shown on this Acknowledgement Receipt will establish the filing date of the application.

National Stage of an International Application under 35 U.S.C. 371**COPY**

If a timely submission to enter the national stage of an international application is compliant with the conditions of 35 U.S.C. 371 and other applicable requirements a Form PCT/DO/EO/903 indicating acceptance of the application as a national stage submission under 35 U.S.C. 371 will be issued in addition to the Filing Receipt, in due course.

New International Application Filed with the USPTO as a Receiving Office

If a new international application is being filed and the international application includes the necessary components for an international filing date (see PCT Article 11 and MPEP 1810), a Notification of the International Application Number and of the International Filing Date (Form PCT/RO/105) will be issued in due course, subject to prescriptions concerning national security, and the date shown on this

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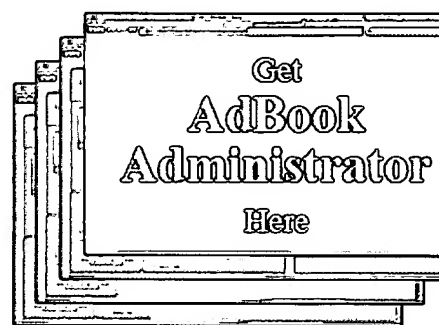
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- Our Company -

- Mission Statement -

- Code of Ethics -

- News & Updates -

- Related Web Names -

- Patent Pending (Summary) -

## MISSION

## STATEMENT

*Recognizing the benefits of not-for-profit groups, professionals, associations and organizations and associations to gather together as peers and represent them individually but with the tools to help them with their mission to promote, practice and police our Ad-Book services and related industry. MORE...*

**AdBook Online** helps many different groups, each in its own way and all strictly confidential, private and safe.

## The ABC's of AdBookOnline Include...

-Assistant -Bookkeeper -Copywriter -Distributor -Electronic transfer  
-Financial coordinator -Gift (Giver & Getter) -Homepage -Internet...

## School Ad Book Groups

- School Clubs
- Elementary through High School
- College or University
- Fraternity or Sorority **Sport Ad Book Groups**

- Baseball Teams
- Football Teams
- Soccer Teams
- Basketball Teams

## Religious Ad Book Groups

- Church or Synagogue
- Sunday School
- Youth Group
- Outreach Programs

## Community Ad Book Groups

- Boys and Girls club
- Girl and Boy Scouts
- Humane Shelter

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***"Declare the past, diagnose the present, foretell the future; practice these acts and make a habit of two things—to help, or at least to do no harm."***

Footnote: *It is a widely held misconception* that the familiar dictum "First, do no harm" comes from the Hippocratic Oath, the oath many physicians take when they enter medical practice. However, the Hippocratic Oath does not and never did contain those words. It expresses a sentiment similar in general meaning, but never employs the words "First, do no harm." It is the opinion of many scholars that Hippocrates did, in fact, originate the phrase, but in another of his writings, Epidemics, Bk. I, Sect. XI. One translation reads: "Declare the past, diagnose the present, foretell the future; practice these acts. As to diseases, make a habit of two things—to help, or at least to do no harm."

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They say "no one wants to be the Ad-Book Chairman twice". Our goal is to be your automated Ad-Book Chairman and the best and only one you'll ever need.

There are roughly 800,000 to 1.5 million registered not-for-profit groups, organizations, associations, charities and rough thousands of other groups, perhaps smaller and more local such as school teams, neighborhood associations or clubs. The energy and good-works of these groups are directed at the own causes and they engage in a variety of fundraising techniques including dinners, outings, car washes, bake sale raffles, and auctions. In addition to other fundraising events.

These organizations also raise money through "ad books" or similar print-promotions and programs. The solicitation, management, printing and "publishing" of these is the focus and business of AdBookOnline.com. In essence, we are the online Ad-Book Chairman for your group or organization.

Ad Books can be a good fundraising tool, but also complex and expensive. We have automated the work for you and thus reduced the process, procedure and printing costs (or to let you group print to your local preferred printer).

Constructing an ad book is time consuming and labor intensive as it requires gathering advertisers, creating ads, collecting money, issuing receipts, organizing the layout of collected graphics, bidding for printing services, proofreading, publishing, and distributing.

With the **Ad Book On Line Assistant** we are your assistant. Creating an Ad Book is now relatively simple and efficient. For those organizations developing the Ad Book, **ABOLA** also offers a great tool for managing their Ad Books and the accounts.

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**MISSION STATEMENT**

*Recognizing the benefits of not-for-profit groups, professionals, associations and organizations and associations to gather together as peers and represent them individually but with the tools to help them join together with the mission to promote, practice and police our the Ad-Book services and industry. MORE...*

AdBook Online helps many different groups, each in its own way and all strictly confidential, private and safe.

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Forms to fundraising facilitator for your group or organization.™

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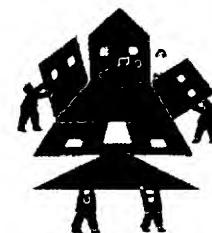
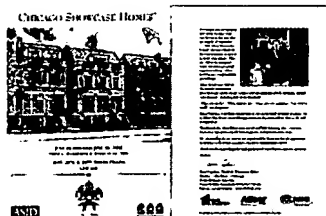
**Our Company**

AdBookOnline.com is AdBook LLC an Illinois limited liability company. The CEO and founder of AdBook LLC is Bruce A. Fogelson.

Fogelson founded the AdBook Online concept, with patents pending since the early 2000'. Fogelson is also the patent inventor of [www.BuilderOnlineAssistant.com](http://www.BuilderOnlineAssistant.com), and an award winning real estate developer in Chicago, Illinois.

Bruce Fogelson, and his company, **Paramount Homes** have won the Chicago Realtors "Good Neighbor Award" practically every year since 1993. Fogelsons motto **"Building neighborhoods and turning buyers into neighbors"** speaks to the broader social mission his other ventures.

Among Fogelson's award winning projects was  
**The Chicago Home and Builders Foundation**  
with it's AdBook Campaign.



**CHICAGO HOME  
& BUILDERS  
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### Code of Ethics



***"Declare the past, diagnose the present, foretell the future; practice these acts and make a habit of two things—to help, or at least to do no harm."***

Footnote: *It is a widely held misconception that the familiar dictum "First, do no harm" comes from the Hippocratic Oath, the oath many physicians take when they enter medical practice. However, the Hippocratic Oath does not and never did contain those words. It expresses a sentiment similar in general meaning, but never employs the words "First, do no harm." It is the opinion of many scholars that Hippocrates did, in fact, originate the phrase, but in another of his writings, Epidemics, Bk. I, Sect. XI. One translation reads: "Declare the past, diagnose the present, foretell the future; practice these acts. As to diseases, make a habit of two things—to help, or at least to do no harm."*

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### Mission Statement

Recognizing the benefits of not-for-profit groups, professionals, associations & organizations & associations to gather together as peer and represent them join together with the mission to promote, practice & police the Ad-Book services & industry.

*These principals are the guiding direction expounded upon as follows:*

- **Promote:** The promotion of our industry as an engine of economic growth and value toward our target marketplace of not for profit groups and to the public in general is paramount to our success as members and as an industry and an Association. Promotion frequently includes such methods as positive public relations, press releases, public-service announcements, industry alerts, co-marketing, joint advertising, maintaining and use of mailing lists and directories, social, educational and political events, peer-recognitions and awards, trade shows & conventions, educational symposiums, outings and similar efforts. To promote in association with each other can create authority, economy and effectiveness to our collective and shelter the sometimes loan voice of our individual members.
- **Practice:** Best practices, current methods and new inventions are all critical to our fast and technical industry and those we serve. The association will act as a clearinghouse for the collection, collaboration and peer review of industry practices. We avoid evaluating one practice or practitioner over another in favor of recognizing the contributions of each and the efforts of all. But this broadest industry vision will, from time to time, be focused by the occasional unifying view of recognized standards or best practices which can serve to propel the industry despite or over the lesser benefits of diversity. Thus is the nature of technology; to stand on the shoulders of giants but hear the voices of "who's next?" and "who's best?"
- **Police:** An industry that polices itself helps guarantee judgment by its peers and avoids public reticule and over regulation. To police the principals and practices of members is to protect the good name of the industry and the effectiveness of this association. The first principals of the association is based on this Mission Statement and its corresponding Code of Ethics. All rules and rulings that stem there from will find validity through open and due process. All rules and rulings will find fairness by avoiding petty, private or political guile. And to further guarantee fair policing of its members, each member shall also bear the individual right to present its case against any member or the association, itself. To police and protect the industry and its members from untruths, unreasonable regulation, unfair practices or poor professionalism is simply the watchful defense of our industry and the livelihoods of our members and the safeguarding of the promotion, practices and profession which are espoused in this mission statement.

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www.OLAllc.com - www.BuilderOnlineAssistant.com - www.HomeBuilderShowroom.com

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**AdBook Online** helps many different groups, each in its own way and all strictly confidential, private and safe.

AdBookOnline.com is your AdBook Assistant online.(sm)  
Administrator from Forms to Fundraising for your Group or Organization

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**Code of Ethics**

ADVERTISERS, PUBLISHERS, MEMBERS, THEIR COMPANIES AND STAFF HEREBY SUBSCRIBE, BELIEVE AND AFFIRM THIS CODE OF ETHICS:

- I. The key responsibilities of our member are to THOSE THEY SERVE selves, their customers, employees, fellow members, and the general public, and the communities in which they live and work. Members will ply their trade as responsible corporate citizens with honesty, integrity, equity and fair-dealings and join together to develop and promote quality, industry, standards and practices and to promote and these ideals. Customers are first.
- II. Our products and services strive to use good practices and craftsmanship, incorporating high standards of ingenuity, value, safety, ease of use, integration, growth, long-life and future uses and service. Members shall act professionally, making good faith efforts to meet contractual, moral and ethical and social obligations and commitments regarding their business activities and personal dealings and shall espouse and promote these behaviors in word and deed.
- III. Members have a responsibility to keep informed of, engaged in and help guide the laws, regulations, public policies, impressions, and public information of our trade and educate ourselves and present to others such things as will affect our industry and the industry of our customers.
- IV. Members shall be loyal to the Association each other and shall refrain from engaging in words or deeds which are untrue, counter-productive or derogatory to the work of the Association, fellow members or of the industry. No Member shall illegally attempt to injure with malice, directly or indirectly, the professional reputation, customer, prospects, business, or employment of a member or the Association; nor shall they carelessly criticize another's work in public or bring shame or rebuke. No Member shall act illegally or with reckless disregard or seek illegally unfair advantage over fellow members. If controversies, allegations, or violation of this Code or the Association byelaws arise or a Member believes another has violated, the Association shall first seek to resolve such controversy through the Association's dispute resolution procedures which shall be in keeping with comparable national procedures for fact finding, mediation and/or arbitration and/or disputes and shall present each such case to the Board of Directors or it's ethics committee for a hearing, determination and relief. The most severe limit to any relief or finding of violation is a.) expulsion from the organization, b.) public notice and promotion of such expulsion and c.) a fine not to exceed One Hundred Dollars (\$100.00) and no member or ex-member may take any legal action against the Association for loss or damages alleged or actual as a result of an ethics ruling which is affirmed by the ethics committee. All Ethics committee rulings may be appealed to the Association or its executive committee within 30 days by notice.

The Association and its members recognize the obligation to safeguard ethics and police each other and the industry for the good of all and will do so with fairness, facts and due process. Members assume these responsibilities freely and solemnly, and are mindful that they are part of the obligations of membership and agree to be

bound by this code of ethics, the bylaws of the Association and the judgments of peers.

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www.OLAllc.com - www.BuilderOnlineAssistant.com - www.HomeBuilderShowroom.com

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## News

Website Launch Date: 5/21/08

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### MISSION STATEMENT



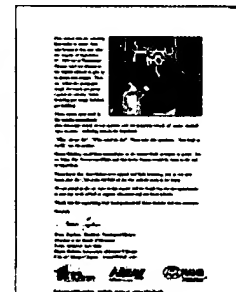
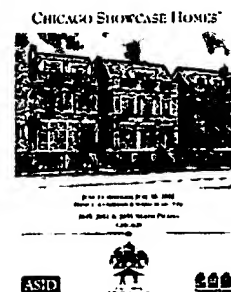
*Recognizing the benefits of not-for-profit groups, professionals, associations and organizations and associations to gather together as peers and represent them individually but with the tools to help them join together with the mission to promote, practice and police our the Ad-Book services and industry. MORE...*

**AdBook Online** helps many different groups, each in its own way and all strictly confidential, private and safe.



**CHICAGO HOME  
& BUILDERS  
FOUNDATION**

## Chicago Home & Builder's Ad Book



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**Related Web Names**

The following domain names are or were registered to OLAllc.com

www.Adbookassistant.com	www.Formsforadbooks.com
www.Adbookassistant.org	www.Fundraiseradbook.com
www.Adbookforms.com	www.Fundraiseradbook.org
www.Adbookforms.org	www.Fundraisingadbook.com
www.Adbookfundraising.com	www.Fundraisingadbook.org
www.Adbookfundraising.org	www.Fundraisingadbooks.com
www.Adbookonline.com	www.Mycommunitygroup.com
www.Adbookprinter.com	www.Onlineadbook.com
www.Adbookprinter.org	www.Onlineadbook.net
www.Churchadbook.com	www.Onlineadbook.org
www.Churchadbook.org	www.Schooladbook.com
www.Churchadbookforms.com	www.Sororityadbook.com
www.Churchadbookforms.org	www.Synagogueadbook.com

*We are constantly adding more web addresses to our Ad Book database in an effort to reach all possible organizations who would benefit from creating an Ad Book. If you would like to suggest a new domain please feel free to contact us by clicking **HERE**.*

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AdBookOnline.com is your AdBook Assistant online.<sup>(sm)</sup>  
 Administrator from Forms to Fundraising for your Group or Organization

**"CLICK HERE to get your FREE AD BOOK FORM now!"****Patent Pending (Summary)**

United States Patent Application - 20070088608  
 Kind Code - A1 - Filed 2001

Method And System For Creating Ad-Books

**Abstract**

A method and apparatus and format and and form are provided for preparing ad-books or related print or publishing for an organization or organizations or a plethora of organization over a communications network. The method includes preparing an ads or messages at a u terminal connected to the communications network. The method further includes processin the "ad" or message at a server connected to the communications network for placing the "ad" or message in an "ad-book" or printing or other publication. The method further includes an automated "ad-book" format or form for the soliciting and obtaining ads or messages which provides methods for collecting ad/message pricing, content, layout, billin and information for ad/message for "ad-book" and related printing or publishing. The method, apparatus, format or form are believed particularly useful to assist and consolidat the efforts of non-profit, charity and similar organizations who, though they may differ in many ways, all rely on ad-books and similar print and publications for their fundraising efforts.

A method for preparing ad-books, or related printing or publication, for a plethora of organizations, such method comprising: preparing advertisements by selecting choices relating to the "ad" or message at a user terminal connected to a communications network; receiving the prepared "ads" or messages at the server connected to the communications network; classifying the prepared "ads" or messages into at least one ad-book; and converting the prepared "ads" or messages into an "ad" or message to be placed into one o more ad-books, printed or published.

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**Confidential Survey** -----Time Frame: ☐ ASAP ☐ Just Looking ☐ LaterYour group uses an AdBook: ☐ Yearly ☐ More or Less ☐ NeverMembers in your group: ☐ 1-100 ☐ 100-500 ☐ 500+Est. price of Full Page Ad ☐ Under \$100 ☐ \$100-\$500 ☐ Over \$500Comments 

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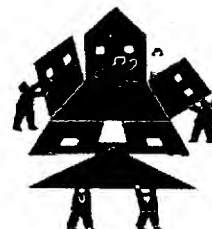
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**Associates**

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www.HomeBuilderShowroom.com

The above sites are among the names of our affiliates, franchises and branded identities. Opportunities exist to join us and adopt our brand names and/or unique technologies.





AdBookOnLine.com<sup>sm</sup>

Jean D. Janvier  
Patent Examiner  
c/o Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-0001

~~Sent Via my Attorney~~

September 16, 2008

RE: Bruce A. Fogelson Art Unit: 3622, Serial No.: 09/885,970  
Filed: 6/21/01 For: METHOD AND SYSTEM FOR CREATING  
ADVERTISING BOOKS aka [www.AdBookOnLine.com](http://www.AdBookOnLine.com) - currently  
Rejected under 35 U.S.C. §103(a) as being obvious over U.S. Pat. #  
2002/0188532 to Rothstein. Vs. Obviousness for one skilled in the art.

Dear Mr. Janvier,

I am writing this letter to respectfully traverse and overcome the rejections, referenced above, as to "obviousness from one skilled in the art". I mean to do this by using a memo provided to me in August of 2006 as a part of our bidding for the technology build-out of our AD-BOOK business process. Please feel free to refer to our new web-site [www.AdBookOnLine.com](http://www.AdBookOnLine.com) for the not-yet-functioning look and feel we hope to achieve if we can proceed with patent protection and make further investment.

In researching for the Request For Proposal to build AD-BOOK we wanted to get the best "user-experience" and history of the field, or personal experience of one skilled in the art. Thus, I met Mr. Lewis Saltzman and Mr. Ira Saltzman, who would say that they were among the oldest ad-book printers in the greater mid-west. The Saltzman's were kind enough to sit for a technical meeting and to write me a brief history and perspective of the field, as well as their desire to make use, once the technology is ready. I believe that the attached memo shows that they, most skilled in the art and history, found my automation of the old process to be unique, novel and needed invention. I submit their memo to you to show their own words in 2006; where as my invention was first devised in 1999! I continue to find no prior art, direct or indirect reference to date.

Sincerely,

Bruce A. Fogelson, Applicant

CC: Jon P. Christensen - Registration No. 34,137  
WELSH & KATZ, LTD. 120 S. Riverside Plaza - 22nd Fl Chicago, Illinois 60606  
Ph. (312) 655-1500 Direct: (312) 526-1566 e-Mail: [JPChristensen@WelshKatz.com](mailto:JPChristensen@WelshKatz.com).  
(I, Bruce A. Fogelson, have moved. My new residence is 1345 W. Wolfram, Chicago, IL  
60657 and my phone is 773-716-6686 and e-mail is now [BruceFogelson@Gmail.com](mailto:BruceFogelson@Gmail.com) )

**From:** Lewis Saltzman      Saltzman Printers  
708 344 4500      Fax: 708 344 9423  
Lewis [mailto:lewis@saltz.com] and Ira Saltzman – Saltzman Printers, Inc.  
**To:** Bruce Fogelson – AD BOOK ON LINE (Patent Pending)  
**Date:** August 11, 2006  
**RE:** Notes and Suggestions for Patent Pending and RFP/RFQ Bids

---

**From:** Ira Saltzman [mailto:ira@saltz.com]  
**Sent:** Friday, August 11, 2006 5:19 PM **To:** Bruce Fogelson **Subject:** 8/11/06 5 p.m.

Saltzman Printers Inc., established 1948 By Milton Saltzman, “cut its teeth” on producing “ad books” including those for many charities and organizations. Elder brother Maurice Saltzman president of BALTA PRESS taught Milton. Balta Press was one of the largest ad books printers in 1930-50s in the Chicago area. Milton started his own printing co. Saltzman Printers Inc., in 1948 and went right into producing ad books for the Chicago area and continues today producing those books for some of those same organizations.

Even though technology is constantly changing, the ad book concept still remains the same as it s original idea, a way for organizations to raise money. Technology has had an impact on ad books and improvements are never ending and always welcome.

Books are produced faster now which gives the organizations more time to promote the event and raise more money for the cause. Technology helps the printer produce more books in the same time. In the past the printer could only produce so much, but now more can be produced in the same time frame.

With today’s technology the computer savvy person can, and some do, create their own page for the ad book and submits their ad via hard copy, disk or e-mail. This saves the organization money on the typesetting and proofing, costs, and gives the organization a shorter deadline. (MORE TIME) The donator also now knows how the ad will look!

At Saltzman Printers we are very excited for the proposed “Ad Book On Line” idea. It could truly revolutionize this industry that is so very important to us, as printers, and to the many organizations in the fundraising efforts that they do. As one of the oldest firms or families that we know in this industry, we can say honestly, and with some authority, that this would be a significant difference in the process and methods for us and our customers.

Lew Saltzman  
Saltzman Printers  
50 Madison Street  
Maywood, IL 60153  
(800) 952-2800 Phone (708) 344-9423 Fax [ira@saltz.com](mailto:ira@saltz.com) email



BAF notes with Adbook.com Meeting on August 10<sup>th</sup>, 2006 with:

Lew Saltzman  
Saltzman Printers  
50 Madison Street  
Maywood, IL 60153  
(800) 952-2800 Phone (708) 344-9423 Fax  
[ira@saltz.com](mailto:ira@saltz.com) email

Methods of transmission of "ads" to printer

- a) Hard copy (ie business card, art, logo, camera ready art) then printer does the process and layout
- b) Email with the attached copy in .pdf and/or .jpg form (most common) then the printer does the process and layout (in addition to printing services)
- c) Email or CD disk of "data complete" with full layout (.pdf form, .jpg form, page maker software form, Adobe Illustrator software form (many) and various others) then the printer still does the pre-press positioning and "clean-up" for printing
- d) "Re-Run" from prior years work with insert changes in any/all formats (see above)

Printer sends computer/data file from, most often converted into Adobe Illustrator Pagemaker format to printing processor to make i)"film" or ii) plates for the mechanical printer to do print runs.

What if emails = 3 to output

To Adobe Pagemaker or Adobe Illustrator or Word = the best to go to "plates"?

Page Ranking, Page Layout, Content, Covers, Photos, Original info about contact info

<u>Old vs. New</u>			
<b>Old</b>			<b>New</b>
0% Content	100% Only Some Ads	More & Better Ads	More & Better w/
Printer does 100% of support layout & graphic lists, original	Printer gets some layout & graphic design and		Content (ie letters photos, sponsor



design & pagination  
 pagination & position  
 contents  
 & position  
 program

information, table of

dinner program, show

Then cut & paste

presidents message,

members, covers

"Automatic" Adbook online file  
 with old/manual files for full  
 pre-print file

### **Old vs. New Continued**

100%

Last minute additions

Online ads

Printed on hand flyers or  
 Insert pages

Online ads with  
 group brochure

List only book (by \$ amount – by ad)

List by multi-search.

Pricing Model

8			
10			
12			
Covers	Ft O		R Out
	Ft I		R/I

3<sup>rd</sup> party suggest "market pricing" can compare one group to a plurality of many

History vs. price sensitivity - Computer can move pricing over time for better  
 result and test price sensitivity... Could even use "smart pricing" offering known  
 big givers higher price ranges.

Pricing model, anticipation, pricing segregated to historical or likely giving ?

Suggestive up-selling lie "last year you gave \$x, this year please give \$x", 2<sup>nd</sup>/3<sup>rd</sup>  
 up-selling solicitation.



AdBookOnLine.com<sup>sm</sup>



Jean D. Janvier  
Patent Examiner  
c/o Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-0001

Sent Via my Attorney

September 14, 2008

RE: Bruce A. Fogelson Art Unit: 3622, Serial No.: 09/885,970  
Filed: 6/21/01 For: METHOD AND SYSTEM FOR CREATING  
ADVERTISING BOOKS aka www.AdBookOnLine.com - As to  
Date Of Invention – Files Found, Verifiable and Sworn/Attest to be True

Dear Mr. Janvier,

I am writing this letter to respectfully traverse and overcome rejections and to amend the file for the above referenced AD-BOOK patent pending file. Please be so kind as to consider my attached memo to my Attorney, Jon Christensen and the 4 sets of exhibits attached thereto. Due to newly filed federal patent litigation, in an unrelated matter, I have recently employed other patent and patent litigation attorneys who, though their special forensic data specialists, have recovered files from older disks, hard-drives and servers that had not previously been found, or even thought to look for. Also now at my disposal is modern sophisticated legal data-search tools that allow me to find and authenticate files and documents along with the true file-dates. Thus, not only do I attest to the origin and original dates, but our expert witnesses can do so in court as need be.

I have made a preliminary search of my old files compiled on the system simply seeking key words "AdBook", "Ad-Book" and "Ad Book" and found numerous examples of my invention of the above method dating to Mid-1999. I believe that my physical files, mostly now in the hands of my other attorneys in Houston, will also verify original hard-copies. (But recent flooding has effectively shut-down the Houston region.)

I do swear and affirm the date of invention of the above referenced Ad-Book application to August 30, 1999 or earlier. I'm instructing my attorney to prepare the proper USPTO forms. I also ask that you add these four Exhibits into my file, along with this letter and my hereby swearing that the information provided is true and correct.

Sincerely,

Bruce A. Fogelson, Applicant

CC: Jon P. Christensen - Registration No. 34,137  
WELSH & KATZ, LTD. 120 S. Riverside Plaza - 22nd Fl Chicago, Illinois 60606  
Ph. (312) 655-1500 Direct: (312) 526-1566 e-Mail: JPChristensen@WelshKatz.com.  
(I, Bruce A. Fogelson, have moved. My new residence is 1345 W. Wolfram, Chicago, IL  
60657 and my phone is 773-716-6686 and e-mail is now BruceFogelson@Gmail.com )

MEMO: September 14, 2008  
TO: Jon Christensen Esq.  
FROM: Bruce Fogelson  
RE: Applicant: Bruce A. Fogelson Art Unit: 3622 Serial No.: 09/885,970  
Filed: June 21, 2001 For: METHOD AND SYSTEM FOR CREATING  
ADVERTISING BOOKS [ Ad-Books ] Docket No.: 80216 vs.  
Rejections Under 35 U.S.C. §103(a) rejected under 35 U.S.C. §103(a) as  
being obvious over U.S. Pat. Appl. No. US 2002/0188532 to Rothstein  
Filed 3/10/2000. - Vs. My Prior Art/Work – First to Invent – Say  
8/30/1999.

Dear Jon,

As part of our efforts to assert prosecute and/or assert our several patents or patents pending I have been using new and sophisticated forensic data software to review past files. It has come to my attention that my "AD-BOOK" patent idea was "Invented" and well under way toward documented patent is early as mid-1999, even though not filed until 2001. The delay to file was most likely due to our simultaneous efforts to file my BUILDER ON-LINE ASSISTANT patent. As you may recall we filed for these BUILDER patents in January 2000 and 2001 and they were quite consuming. These resulted in two issued patents to-date. The reason for my recent file-review is made more obvious by the following summary widely reported news story.

The Clearman Law Firm Announces Patent Infringement, Fraud Lawsuit Against Nation's Largest Homebuilders and Home Products Manufacturers *Pulte, Lennar, David Weekley Homes, Honeywell, Whirlpool, others named as defendants* By PR Newswire:

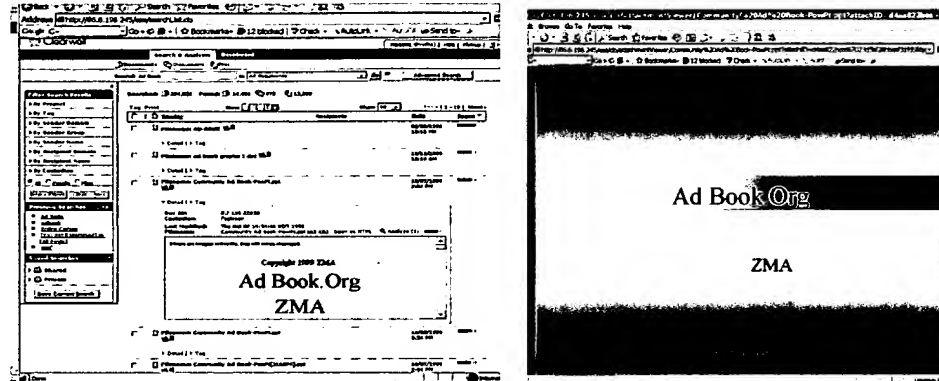
MARSHALL, Texas, Aug. 21 /PRNewswire/ -- Attorneys from Houston's The Clearman Law Firm are announcing a federal lawsuit filed late yesterday on behalf of the owner of HomeBuilderShowroom.com against a group of nationally recognized homebuilders and home products manufacturers. The 72-page petition alleges the defendants committed trade secret theft, fraud, patent infringement and violated antitrust laws and confidentiality agreements in order to build a competing Web-based business. According to the lawsuit filed in the U.S. District Court for the Eastern District of Texas in Marshall, the owners of HomeBuilderShowroom.com invented the "Builder's On-Line Assistant" in 1999. The revolutionary service was created as a means of using the Internet to connect homebuilders, manufacturers and homebuyers. The company's design allowed builders to offer standards and upgrades for homes as well as the opportunity for homebuyers to make their purchasing decisions online using virtual showrooms. The owner of HomeBuilderShowroom.com – OLA, LLC, a privately held company based in Chicago – applied to patent the processes associated with "Builder's On-Line Assistant" in January 2000, and received two related patents in 2006 and 2007.



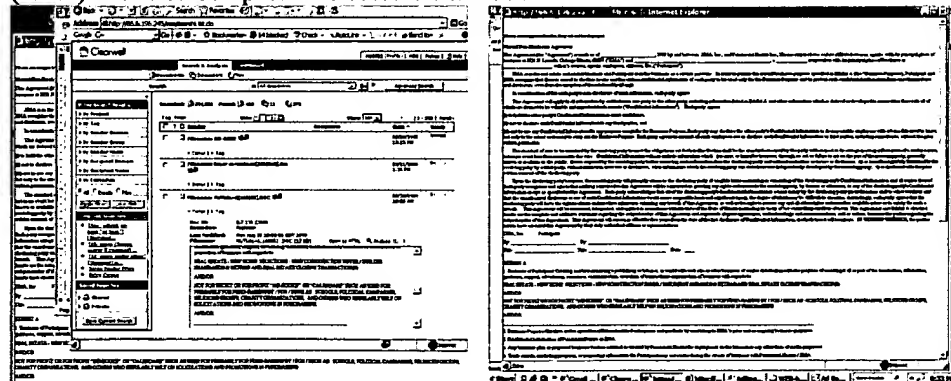
Please note that prior to filing this suite my files, including previously un-available files from old hard-drives, etc, were preserved by a forensic data specialist and expert witness. These files were compiled on a special new legal-search-engine, thus allowing me to do key-word searches back beyond even what I could have known years ago. Where as we are rushing to respond to the USPTO for our next official response by September 25, 2005 I have only had time to find a few select documents to show proof of invention to the soonest date. But my preliminary findings show documentary proof of my AD-BOOK Invention back to Mid-1999. And I thought that this should be important to prove first to invent and as opposed to the later filing date of a key objection patent cited by the USPTO Examiner, namely US 2002/0188532 to Rothstein Filed 3/10/2000.

The following are screen-shots of a.) the data-search-engine in-work, showing the dates of the search results as encrypted on my computer back then and b.) an example of the document providing proof-of-date and describing my AD-BOOK invention. A print-out of these examples is attached and I will swear to the date and authentic nature of each.

**Example #1.: Ad Book Business Plan – Power Point Description  
Verified Date 10-7-1999 – See Full Power Point Exhibit**



**Example #2.) “Ad-Books” reference found on ZMA’s Non Disclosure Agreement (NDA) Verified computer file dated 8/30/1999:**



\\fog-server\users\bruce\My Documents\My Files\WEB-home\AdBook History - Home 9-14-08.doc

*(Handwritten signature)*

Example #3.: Business Plan v2 for AdBookOnLine.com  
Verified Date 2-28-2000

The left screenshot shows a web browser window with the address bar displaying 'http://www.adbookonline.com'. The page title is 'Business Plan v2'. The page content includes a table of contents and a list of links. The right screenshot shows a web browser window with the address bar displaying 'http://www.adbookonline.com'. The page title is 'Business Plan v2'. The page content includes a table of contents and a list of links.

Example #4.: AdBook Web-Names spread-sheet – Obtaining Business Names \  
Verified Date 10/11/1999

The screenshot shows a web browser window displaying a spreadsheet titled 'AdBook Web-Names spread-sheet'. The spreadsheet has four columns: 'Web Name', 'Domain', 'Status', and 'Date'. The 'Web Name' column lists various domains, including 'adbook.org', 'adbook.net', 'adbook.com', 'adbook.info', 'adbook.biz', 'adbook.us', 'adbook.ca', 'adbook.co.uk', 'adbook.de', 'adbook.fr', 'adbook.it', 'adbook.es', 'adbook.pt', 'adbook.nl', 'adbook.be', 'adbook.lu', 'adbook.ch', 'adbook.at', 'adbook.se', 'adbook.no', 'adbook.dk', 'adbook.fi', 'adbook.is', 'adbook.no', 'adbook.se', 'adbook.dk', 'adbook.fi', 'adbook.is'. The 'Domain' column lists the corresponding domain names. The 'Status' column indicates the status of each domain, such as 'Available', 'Taken', 'Reserved', etc. The 'Date' column shows the date of the search, which is '10/11/1999'.

Jon, as part of my response to the USPTO, I would like you to send a copy of this letter and prepare the appropriate affidavit for me to swear over an Invention Date of at least August 30, 1999, if not sooner. I do have sooner references found in my search with the "ad book" term, but this referenced Exhibit A to my form NDA should be soon enough.

Sincerely,

Bruce Fogelson  
Inventor / Applicant

A handwritten signature in black ink, appearing to read 'Bruce Fogelson'.



Ad Book

Example

# 1

from 10-7-1999

BA

Bruce Fogelson

Ad Book.Org

ZMA

Copyright 1999 ZMA

## What is an Ad Book?

- **Ad Books are Fundraisers!**
- **Ad Books Raise Money for Organizations**
- **Sponsors Pay Rates Based Upon Size and Placement of Ad, not Circulation**
- **Ad Book is Distributed only at a Function or Directly to Members and Advertisers**

Copyright 1999 ZMA

10-7-99  
Bry

## Functions of Ad Books

- Fundraising
- Self Promotion of an Organization
- Promote Supporters of Organizations
- Small, Selective Distribution
- "Advertisers" = Sponsors

Copyright 1999 ZMA

## Goals

- Internet Solution
- Mechanism for Organizations
- Greater Presence for Non-Profits
- Publishing Via the Internet- Capture Web Page Services

Copyright 1999 ZMA

## Description

- **Organizations Use Us to Create Their Ad Book**
- **Ads with Layout over the Internet**
- **Distribute Ad Books in Print and Cyber Form**

Copyright 1999 ZMA

## Features

- **Quality Ad Book Product, Printed and Distributed**
- **Ad Book with an Online Presence has a Longer "Shelf-Life" & Just Click to Use**
- **"Web Page" for Groups That Do Not Have an Online Presence**

Copyright 1999 ZMA

## Features (Cont.)

- **Create a New Ad Venue to Support Organizations by Pre-Selling Ads from National Companies to**
  - **Boost Revenue to Organizations**
  - **Open a New Market for National Advertisers**
  - **Companies can also be “Sponsors” of the Community**

Copyright 1999 ZMA

## Features (Cont.)

- **Create a New “Community” of Links with “Sticky” Users**
- **Automation of the Solicitation Process to Recapture Past Advertisers**

Copyright 1999 ZMA

## Ad Book Market

- Schools
- Churches
- Political Groups
- Trade Associations
- Unions
- Lodges
- Fraternities and Sororities
- Sport Teams
- Fan Clubs
- Non-For Profits
- Arts Clubs
- Community Groups
- Block Clubs
- Associations
- Hospitals
- Charities
- Campaigns
- Fundraisers
- Building Funds
- Social Clubs
- Moose Lodge
- Scout Troops
- Medical and Legal Associations
- Non Governmental Organizations
- Theatre Groups

Copyright 1999 ZMA

## Competitive Analysis

- **Competitors**
  - Have not Implemented This Idea on the Internet (See Examples in Appendix)
- **Strengths**
  - Untested Market for Internet
  - Modular Design
  - Economies of Scale
  - Marketing to Advertisers
- **Weaknesses**
  - Untested Market for Internet

Copyright 1999 ZMA

## Technology

- **Use of Internet Creates**
  - Inexpensive Way to Create Ad Books
  - Allows Ad Purchasers to Directly Control Layout of Ads (HTML, Acrobat, Photoshop)
  - Central Depository
- **Publishing Paper Ad Books**
  - Computers Allow Us to Print and Distribute Ad Books (Eliminate Kinkos and Related Printers)

Copyright 1999 ZMA

## Team/Resources

- **Management**
- **Web Design / Platform Development**
- **Marketing**
  - Community Outreach
  - Advertisers/Sponsors
- **Legal Team**

Copyright 1999 ZMA

## Benefits to Organizations

- **Web Presence That Provides a Forum**
- **Low to No Cost to Organizations for Service**
- **Simplification of a Time Consuming Process**
- **Network of Advertisers to Help Supplement Ad Book**

Copyright 1999 ZMA

## Benefits to Sponsors

- **Simplistic Method to Place Ads**
- **Cyber and Paper Ad Books**
- **Direct Marketing to Specific Segments of Consumers**
- **Interactive or Direct Links to Advertisers/Sponsors**

Copyright 1999 ZMA



## Future Sites

- Community Resources
- Community Calendar
- Community Notebook
- Larger Publishing Ventures

Copyright 1999 ZMA

file "Community Ad Book - PowerPoint.ppt"

Attest to And

Verified file Date

10-7-1999 By

Bruce Fogelson

Ad Book

~~Example~~

# 2

from 8-30-1999

Ba

Bruce Fogelson

Mutual Non-Disclosure Agreement [ computer file history verified dated 8/30/1999 See Exhibit A ]

This Agreement (the "Agreement") is made as of \_\_\_\_\_, 1999 by and between ZMA, Inc., and Paramount Homes Inc., Illinois corporations and its affiliated owners, agents with its principal place of business at 2731 N. Lincoln, Chicago Illinois, 60614 ("ZMA") and \_\_\_\_\_

\_\_\_\_\_, a \_\_\_\_\_ corporation with its principal place of business at \_\_\_\_\_ with it's owners, agents, employees, affiliates, Etc. ("Participant").

ZMA is in the real estate and related business and Participant is in the business as a service provider. In order to pursue the mutual business purpose specified in Exhibit A (the "Business Purpose:), Participant and ZMA recognize that there is a need to disclose to one another certain confidential information of each party to be used only for the Business Purpose and to protect such confidential information from unauthorized use and disclosure, even from the inception of the relationship (if any).

In consideration of the each party's non-disclosure of such information, each party agrees:

This Agreement will apply to all information by and between one party to the other party, including information listed in Exhibit A and other information which is derived or developed in connection therewith all of which are deemed to be valuable and important trade secrets ("Confidential Information").

Each party agrees:

- (i) to hold the other party's Confidential Information in strict confidence,
- (ii) not to disclose such Confidential Information to any third parties, and
- (iii) not to use any Confidential Information for any purpose except for the Business Purpose. Each party may disclose the other party's Confidential Information to its responsible employees with a bona fide need to know, but only to the extent necessary to carry out the Business Purpose. Each party agrees to instruct all such employees not to disclose such Confidential Information to third parties, including consultants, without the prior written permission.

The standard of care to be exercised by the receiving party to meet the obligations set forth in this Section shall be the standard exercised by the party with respect to its own proprietary information of a similar nature, but in no event less than reasonable due care. Confidential Information will not include information which: i) is now, or hereafter becomes, through no act or failure to act on the part of the receiving party, generally known or available to the public; ii) was acquired by the receiving party before receiving such information from the disclosing party and without restriction as to use or disclosure; iii) is hereafter rightfully furnished to the receiving party by a third party, without restriction as to use or disclosure; iv) is information which the receiving party can document was independently developed by the receiving party; v) is disclosed with the prior written consent of the disclosing party.

Upon the disclosing party's request, the receiving party will promptly return to the disclosing party all tangible items containing or consisting of the disclosing party's Confidential Information and all copies thereof. Each party recognizes and agrees that nothing contained in this Agreement will be construed as granting any rights or licenses to the receiving party, by license or otherwise, to any of the disclosing party's Confidential Information except as specified in this Agreement. Each party acknowledges that all of the disclosing party's Confidential Information is owned solely by the disclosing party (or its licensors and/or other vendors) and that the unauthorized disclosure or use of such Confidential Information would cause irreparable harm and significant injury, the degree of which may be difficult to ascertain. Accordingly, each party agrees that the disclosing party will have the right to obtain an immediate injunction enjoining any breach of this Agreement, as well as the right to pursue any and all other rights and remedies available at law or in equity for such a breach..

This Agreement will be construed, interpreted, and applied in accordance with the laws of the State of Illinois (excluding its body of law controlling conflicts of laws). This Agreement and Exhibit A attached hereto are the complete and exclusive statement regarding the subject matter of this Agreement and supersede all prior agreements, understandings and communications, oral or written, between the parties regarding the subject matter of this Agreement. This Agreement will remain in effect for five years from the date of the last disclosure of Confidential Information, at which time it will terminate. IN WITNESS WHEREOF, the parties hereto have executed this Agreement by their duly authorized officers or representatives.

ZMA, Inc.

Participant


By: \_\_\_\_\_ By: \_\_\_\_\_ Date: \_\_\_\_\_  
Title: \_\_\_\_\_ Title: \_\_\_\_\_

EXHIBIT A

1. Business of Participant: Creating and/or maintaining a publishing or Internet, or world wide web site or other business of similar distribution with the purpose of assisting it all or part of the transaction, information, guidance, support, advertising, commerce, communication, execution of transactions or promotion of business with regards to

REAL ESTATE - NEW HOME SELECTIONS - NEW CONSTRUCTION BUYER / BUILDER  
STANDARDS & EXTRAS AND REAL ESTATE CLOSING TRANSACTION(S)

AND/OR

 **NOT FOR PROFIT OR FOR PROFIT "AD-BOOKS" OR "CALENDARS" SUCH AS USED FOR PRIMARILY FOR FUND-RAISING BY / FOR / SUCH AS : SCHOOLS, POLITICAL CAMPAIGNS, RELIGIOUS GROUPS, CHARITY ORGANIZATIONS, AND OTHERS WHO REGULARLY RELY ON SOLICITATIONS AND PROMOTIONS IN FUNDRAISING.**

AND/OR:

\_\_\_\_\_  
\_\_\_\_\_

2. Business Purpose: Creation and/or operation of Internet related enterprises and products by or relating to ZMA's prior and or ongoing business purposes.

3. Confidential Information of Paramount Homes or ZMA:

- a. Any business plan or proposed business venture initiated or created by Paramount Homes for deployment on the Internet or any other form of media proposed.
- b. Trade secrets, marketing programs, or proprietary information the Participant may encounter during the course of business with Paramount Homes / ZMA.

4. Confidential Information of Participant: Proprietary information not utilized by the Participant to advance the business ventures of Paramount Homes.

5. The attached exhibits including page \_\_\_\_\_ of \_\_\_\_\_ referred to as

\_\_\_\_\_ are attached hereto and expressly contained herein.

ZMA, Inc.

Participant

By: \_\_\_\_\_ By: \_\_\_\_\_

Title: \_\_\_\_\_ Title: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

[ Computer - File reference found / verified as far back as 8-30-1999 - BAF ]



Ad Book

Example

#3

from 2-28-2000

(OR ~~same~~/Earlier)

BA

Bruce Fogelson

Note V.1 To be Located.



**Business Plan v.2**

**AdBookOnLine.com, .net, .org**

AKA

A sample of the corporate web-names reserved by ZMA in the .com, .net or .org:

Mycommunitygroup, yourcommunitygroup, charitygroup, communitygroup,  
onlineadbook, adbookassistant, adbookonlineassistant, adbook.org, communityadbook,  
Groupadbook, schooladbook, adbookprinter, adbookprintsourc

**A Cherity Group Ad Book Consolidator,  
A Cherity/Community Internet Service Provider  
and Creating a New Media For Ad/Sponsors**

Our Mottos: .....

*"Helping you raise moneys: Connecting theCherity/Community Group & Ad / Supporters and  
administration of Cherity AdBooks with the help of the virtual-world of e-commerce. "We put  
your group first, period ("."as in "dot-org"),and back you up with our back office."*

Bruce A. Fogelson  
President, ZMA, Inc & OLA, llc.  
2501 N. Lincoln, #225, Chicago, IL 60614  
773-528-9077 Fax: 773-528-8848  
Web. Bruce@OnLineAssistant.net or  
bafont2@yahoo.com  
See Conditions Below:

Copy # \_\_\_\_\_

**NOTICE, DISCLAIMERS & CONDITIONS:** These materials are expressly confidential and shall remain the property of ZMA, Inc & OLA, llc and or Bruce Fogelson (OLA). By opening this document, breaking the seal and or reading or referring to any part hereof you agree to be bound by the confidentiality including but not limited to the following terms (in addition to any prior agreements). Any unauthorized use, reproduction, or distribution of these materials is expressly prohibited. All materials must be returned to OLA, upon request. All potential disclosures or conflicts of interest are to be avoided, but must be conveyed to OLA, in writing immediately. OLA its owners, agents, contributors, managers or other representatives make NO guarantees, representations or statements in connection herewith which may be used or relied upon for any reason including as to accuracy or completeness of these materials, estimates, or conclusions. This information is in draft form and is subject to errors, rounding, estimations, and omissions. These materials are not: an offer, a solicitation for an offer to buy securities, or a solicitation to invest. These contents and ideas represent a new and risky business venture and make no representations as to profitability or success but do suggest and affirm that this business has substantial risk of loss and no history of success. This information is subject to copyright © by OLA, llc, 1999 & 2000. Any reader of this document is subject to a confidentiality & non-disclosure agreement similar to the form attached herein. DO NOT PROCEED UNLESS YOU ARE IN FULL AGREEMENT WITH THE ABOVE NOTICES, DISCLAIMERS AND CONDITIONS.

**Draft notes – confidential – www.AdBookOnLine.com Business Plan**

**By Bruce A. Fogelson  
Presidnet/Founder  
ZMA, Inc. & OLA.llc  
773-528-9077 – Fax: 8848  
Bruce@OnLineAssistant.net**

**The following are the consolidated notes and images in thinking about our new business plans. This DRAFT is being issued for your private viewing and personal comment. Please respect the confidential nature of our plans and pardon this rough draft of ideas. I look forward to your comments and assistance.**

**Ad Book/CommunityGroup.com/.net/.org**

The regular business of fundraising calls for community groups to “fan-out” for solicitations only to “get-back-together”. Many not-for-profit/community groups have volunteers or are under-staffed and have little or no “back-office”.

The regular tools of fundraising include ad-books, bake-sales, auctions, and similar scheduled events. These fundraising businesses are “re-invented” nearly every time as new members take over from year to year. Likewise, they rely on the “volunteer/members” to act as sales people and fundraisers for each event. These members have limited reach, limited support, and an old-fashion back-office.

The regular meeting place for community groups is in churches, schools and community centers. They do not often have state of the art offices or facilities. This is made harder by the part-time and off-hours that many such volunteer groups keep.

The Internet is a new coming together of communications, files, services, and communities. Many “web.” businesses refer to their users as “communities” or what we often call market segments or target markets or what politicians call constituencies. These new “communities” of users are in fact not communities but classifications. (Using the definition that a classification is what we call others and a community is what we call our selves) I argue that “communities” as a target market are already established around their own needs. Community groups such as schools, churches, charity, neighborhoods, causes, municipalities, amateur sports, politicians (more like a personality cult than community but very similar) and the like are existing communities.

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These existing communities need better support in two ways. 1.) better meeting and business tools for fundraising and 2.) better “clusters” so that more can be raised by the “groups” as a whole.

Enter COMMUNITYGROUP.ORG. We propose to create web sites and solutions for these sorts of groups and cluster these groups so as to achieve greater symmetry and power for the group as a whole (in a seamless way so as not to interrupt the delicate independence and identity of each group).

At CommunityGroup.org, we put your name first and back up your fine work with our “back-office”. Whether for the entire community group or just it’s Ad-book or Calendar or Web-Page or Auction, we propose to create relatively common-thread web applications which can be accessed and supported by us but will “capture” the organization by offering their name, period, backed up by our site-solution. For example, your local school may soon be reached at [www.jfkschool.communitygroup.org](http://www.jfkschool.communitygroup.org) or your [www.St.John.churchgroup.org](http://www.St.John.churchgroup.org) or the [www.paton-34.funddriveonline.org](http://www.paton-34.funddriveonline.org) or the [www.latinschool.adbook.org](http://www.latinschool.adbook.org) or the [www.your-group-name-here.charitygroup.org](http://www.your-group-name-here.charitygroup.org), Etc, Etc, Etc,...

We at communitygroup.org/.com/.net, through ZMA, Inc. will then offer “back-office” suite of services such as calendars, ad-books, meeting rooms, web-pages, publishing, membership, applications, visa, directories, e-mail, etc. All these will be open 24/7 and for a fraction of the cost.

By gently “Channeling” of focusing similar groups into similar patterns and practices we will create “clusters” of community groups. These are similar “target-markets” but rather than thinking of each individual as a spot on the target we like to think of just capturing the entire target (including each individual spot – the group representing the “target” and the individuals only being one spot in the various “rings” around the target”) By capturing a target market of community groups we create an even larger critical mass based on a market theme and consisting of the “themes” of organizations, focus, group, and, members. For instance, picture a group of 25 local school councils or 35 regional high-school foot ball teams or 55 church groups or 200 local chambers of commerce or 75 local builder’s associations or a dozen fan-clubs or car-clubs or 50 local alderman.

In each case these groups by them selves could not go to a national advertiser and ask for an ad in their ad – book. However, if we at ZMA can deliver such large groups to...oh, let’s say the North Illinois Dodge Dealers for an ad in each book? Or, maybe the local McDonald’s group or even your local builder who’s kids are on the team but wants his trades to buy an ad (which also gets them a web-link).

It is our position that advertisers (as well as individuals) will want to “show support” and to local communities and groups. It is only the small and individual nature of these ads that keeps larger accounts away from these important opportunities to support their target-markets. Likewise, certain markets will naturally attract focused advertisers... Church groups for trips to the holly-land, caskets, books, etc....Sports teams for sporting-goods,....Etc.. Imagine how happy a community group would be if they knew that their



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ad-book was pre-subscribed by \$\$\$\$\$. Groups would do an ad-book just to get the pre-sold group adds.

By marketing to and “capturing” community groups we effectively get to their members. We also avoid mass-marketing costs and can focus on administration and boards. The institutional quality of community groups offers a much more long lasting and broader client base. One person may change his web-page and addresses (like we change phone numbers) but a group will not soon look to re-enter all it’s members names, let alone change its “address” and identity. Community groups are, using the vernacular, “sticky”. In addition, the members themselves will turn to the group’s “site” time and time again depending on the activities of the group that is naturally “sticky”.

By offering them lo-cost and focused solutions on “getting-together” for such things as group calendar, group chat room, group board-meetings and voting, etc the group will appreciate their new tools and location more than they ever knew. By focusing the fund-raising data entry and collaboration and offering others the opportunity to “show their support” and “see their support” the group can now link from it-self to it’s member’s and sponsor’s sites and generate further “good-faith”

ZMA, Inc. Plans to create this environment and bring it to market focusing on getting the groups themselves to sign up. (if they don’t have a computer we’ll buy them web-t.v. for \$150.00). This requires a focused national sale but should be substantially industry or group driven, not mass-market.

ZMA, Inc. will make money in the usual internet start-up ways but the focus of our revenue will be the e-commerce revenue by these groups regular fund-raising being charged by VISA/AM-Exp over the Internet with a processing surcharge. In exchange for this surcharge, we will provide proper accounting and back-office or e-business support. Members, supporters or givers can charge directly or the community group’s regular staff can process their regular accounts through the site as they would now.

A typical ad-book page costs about \$25 to \$35 to produce and can sell for anywhere from \$100 to \$10,000. There should be a reasonable amount of “margin” in this formula for the cost to come down and quality to go up (via consolidated and internet publishing) and the transaction service of a new back office/meeting place.

This method also allows for payment, in effect, on contingency. No up-front payment means an easier “sale” to the organization who look to spend little or no money and make the “business” side of fundraising and organizations easier on the volunteers and members.

This narration dose not even touch on the “auction” aspects of these sites. One of the biggest aspects of fund-raising for such groups is their “re-sale-shop” or auction night. These work due to donations (with tax deductions) and sales to the organization (with tax deductions) and the ability to – pass-through – products to buyers with the money going

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to the group. I can picture many more "gifts" to groups in support and more "sales" conducted for a group by the group's web-page auction than during one dinner auction.

The following are notes not yet processed in creating this narration. Like the idea they are early stage and very secrete.

Draft notes – confidential – www.AdBookOnLine.com Business Plan  
By Bruce A. Fogelson

### **EXECUTIVE SUMMARY - OUTLINE**

#### **Com.group**

Communicate

Com Group Members

#### **Supplies Public**

Tools - OLA will offer three levels of tools:

1. General 'suite'
2. "Category killer"
3. "Semi custom"

### **The Suite**

1. Client Folder utilizing
2. E. Mail utilizing
3. E. Commerce utilizing
4. Calendar utilizing
5. Conference (Chat) utilizing

These basic tools will leave the "back office" out of the way of the business simple web site and can be expanded, as tools become common.

The "category killer" is a tool or tools that requires an updated data-base or platform that is good for the community as a whole but more cost effective as a service than an in-house project and can link back to the business and it's users. The key examples are:

## Category killer tool

### Ad.books

Vast database hand entered by many sources with printer industry specific output and repeat renewal re-marketed for lower repeat cost.

## Semi-custom services

Once in the family of OLA larger and growing users can use our "platform" to customize and add tools. This will also provide key ideas for generic application back into the industry segment.

### The mission

1. Provide a suite of web-based tools within targeted "community" markets and businesses including A). Basic tools B-2-B (business to business) I. Calendar II. E-mail B-2-C (business to customer) III. E-credit card IV. Conference. B) Specialty "category killer" tools I. Builder/buyers = standards and extras II. Community groups ad-book- auction C. Business and client account files with info and "shopping cart"/ job folders to keep and coordinate work
2. Boost sales and speed commerce
3. Support industry solutions and innovation with standardized or synergistic E-tools
4. Create and manage industry co-marketing outlets within our industry business clients and between the business and consumers.
5. Create a workplace/point of purchase- industry by industry where pre-point of-post purchase can be maintained and fostered particularly in larger/multiple aspect purchases.
6. Create and promote back-office solutions to web business.

### The industry - new home

The industry – not for profit organization (NPO)

The not for profit/charity/community based organizations (CBO) markets are as varied as any cause. Despite what these varied groups view as the heartfelt "product" their "sales" are surprisingly similar (to borrow the analysis from the profit world)

These point of purchase opportunities include such things as group membership, ad-books, raffle, events, auctions, project support, and flat out gifts

## Industry size

The industry in America alone is well over \$150 billion to N.P.O. via foundation, individuals, corporate, government, etc. The IRS registers over 650,000 public charities and has grown by about 6%/year from 1989 to 1994.

### **Industry – historical – non-web**

The current state of the industry is behind its “for profit” sector in many ways do to the obvious reasons of core philosophy are non-business. Heavy reliance on volunteers and the perceived lack of funding which can be rolled back into the organization

### **Industry – web**

Few if any N.P.O.S have turned to the web for fund raising like the for profit world. Much of the limited use has been for promotion and not E-commerce. We have yet to find any service providers offering a “suite” of general E-solutions such as we are promising.

Although some sites are emerging in order to capture the donor dollar no sites seem to want to capture the community group itself (and then the E-commerce).

Our search of the industry is contained in appendix \_\_\_\_\_ a summary search of the search parameters is as follows:

Nearly every site which we believed could have been competitive has been visited and printed. See appendix \_\_\_\_\_.

## **Target markets – customer bases**

### **Community group**

Charity  
Church group sports team  
Condo association  
Homeowners association  
Block club  
School  
Hospital  
Politicians  
Associations

## **Marketing**

Where as our target markets are industry specific we plan to use the most focused industry-direct marketing tools. These tools include such things as trade group publications, trade shows, direct mail, web-mail.

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Attached exhibit \_\_\_\_\_ includes a list of targeted marketing venues and general budgets.

Select spot general marketing will also be utilized to build brand names and general traffic. The principal medium will be further defined by our ad consultant and us but radio and billboard are top on the list as of now.

Co-marketing will occur with our business users through their customers.

The "brand" identity as a component of marketing will exist on three levels in order to capture three types of users.

1. Generic-OLA. Will be targeted to industry/user groups so as to promote on line assistance to them on an exclusive basis. Thus a user can "log on" to our site via his site or directly using \_\_\_\_\_. On line assistant \_\_\_\_\_. This is most likely for larger brand sensitive type.
2. By market/task as a crossover to promote 3<sup>rd</sup> party customer support. Thus a user x, can log on directly or through his site to benefit from an industry endorsed 3<sup>rd</sup> party site.
3. Public/retail site: focusing on one or two key names our site will be the "back-door" for consumers to see and use the site for themselves (and against non-subscribers) thus a retail customer to builders depot can browse builder selections and to community group to find, join a community group.
- 4.

### The competition

**We have conducted the following market research in seeking out competitive and industry related sites these searches include:**

#### Web brows search

Web browser searches by topic utilizing the following search parameters and search tools:

#### Name by name search

A name-by-name search of every possible name we can think of or run across has been conducted and every potential site visited. The home page of each such site is in the appendix \_\_\_\_\_

In order to grade the sites by similar if not similar.

We have used a subjective relative scale to "lump together". These comparable sites.

Comparable or "comp" sites where subjectively grouped into the following categories:

1/4 comp: vaguely industry related but not competitive

1/2 comp: industry related but not directly competitive but somewhat or some part could emerge as a competitor or ally.

3/4 comp: directly related and competitive in whole or part. Not exact but worth closer review.

100% comp: head to head competitive in significant ways.

A table of the names searched is attached and constantly being updated.

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Search names are also reviewed for useful or related tech-solutions or examples of good site execution or tools.

Search names are often "held" with no site yet established. These names which are researched are tagged N/A/-H for not available-held and on N/A/-C for not available-comp.

Sites are also tagged as "A" available - future or potential site name not yet taken

Our sites are indicated as "G" got. Site names are paid for and generally go to \_\_\_\_\_.

The list of all site names is in appendix \_\_\_\_\_. Currently we own sites by industry as follows:

Online assistant \_\_\_\_\_

Community group \_\_\_\_\_

Other \_\_\_\_\_

Total names owned \_\_\_\_\_

### **Tools in place**

As a service provider we do not consider limited web applications within a given users site to be competitive these cases such solutions are:

A). Only for the user and not being marketed to the users peers.

B). Do not represent a full suite.

C). Do not have any "key category" functions.

D). require custom installation and upkeep in house by non-web based business.

There is very little market penetration for web sites or web tools generally non businesses first obtain a site for promotion and e-mail. (such as , they might get a sign and a mail box.)

Even sophisticated self-site tool users would find benefit from the many features and updates offered by us to them and their industry category kill applications.

More by using the users own name and housing we/they keep identity.

### **The barrier to entry**

As a business to business/community solution we feel that the current business-customer relations and trade names are valuable and coveted. In order to "slip" in to assist in the pre-existing relationship it is the "task name" and not a new "brand name" which may be allowed in.

As an industry-solution-task oriented application the name is a key to "what" as opposed to "who" thus our broad band of names allows our industry users to "call us what they will" and continue to promote their name before ours. Once in a business site to click on our site keeps the user "on-task".

Having secured these key industry specific names is one barrier for copycat entry.

Focusing on first to market service relationship in an industry is one barrier to entry. In our B-2-B and B-2-C plan we will serve the business as the focus of our site. Businesses engage in habit forming repetitive use. Businesses are harder to move. Whole groups of

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individual client data than individuals. Businesses and consumers are inclined to not “disconnect” to move to a new venue.

Creating the suite of products means that \_\_\_\_\_ can provide one –stop shopping for a mix of services.

Moreover the “category killer” solutions can/will become an industry standard and thus hard to catch up.

### **The ability to attract strategic partners**

Strategic partner, supporters, sponsors, co-marketers..., these are the things one finds within an industry.

These non-threatening/cooperative relationships are well fostered in on-line industry. As easy as a hyperlink and we can cross promote industry “partners” some “industry partners” are as follows. Currently all such groups regularly co-market within their industry. Thus one “tool” that is both general and a “category killer” is cross marketing – made easy by our industry platform.

### **Community groups**

Corporate sponsors  
Experts/referrals

Suppliers  
Government

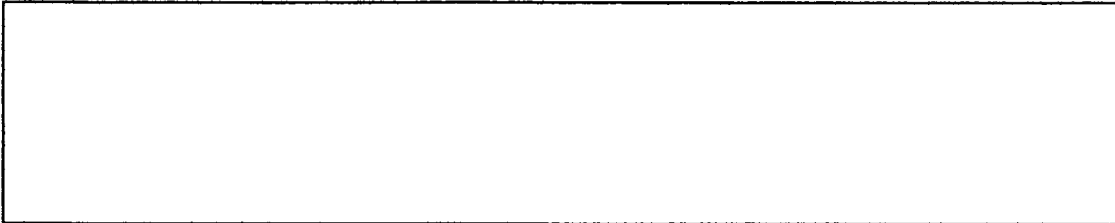
Associations  
Celebrity endorsements

### **The community group market sales model**

Market Sale	Product		
Community groups	home page		free
Membership	E-commerce	% of sale	\$ _____
Members page			
Fundraisers			
<u>Raffle</u>	E-commerce		\$ _____
<u>Auction</u>	E-commerce		\$ _____
<u>Whatever</u>	E-commerce		\$ _____
<b>Ad Book</b>			
Our local advertisers	E-commerce		\$ _____
Our regional advertisers	E-commerce		\$ _____
Member-advertisers	E-commerce		\$ _____
Printing and publishing	E-commerce		\$ _____
<b>Web publishing</b>			
E-mail broadcasting			\$ _____
E-mail publishing (flyers)			\$ _____
“Matching” gifts			\$ _____
Direct fundraising %			\$ _____
Public relations advertising			\$ _____
Total			\$ _____

## **The organization and team**

Organizational chart



The team

Position(s)/description(s)  
Compensation  
(Candidates)

### **Employees – on staff consultants**

Founder.

Bruce Fogelson

---

C.E.O.

. Bruce Fogelson

---

President

Sr. VP.

C.T.O.

Cari Perlman

### **Business consultants**

Currently ZMA & its affiliates have ongoing relationships with OLA, llc.

Legal: Jenner & Block, Vedder Price, Wigoda & Wigoda, Mayer Brown and Platt

Accounting: F.E.R.S., Swidler Financial

Advertising/P.R.: Lynn Walsh Communications

### **Internet consultants**

Web design

Web hosting

E-commerce/links

Draft – Confidential -



## Industry size

The industry in America alone is well over \$150 billion to N.P.O. via foundation, individuals, corporate, government, etc. The IRS registers over 650,000 public charities and has grown by about 6%/year from 1989 to 1994.

## **Industry – historical – non-web**

The current state of the industry is behind its “for profit” sector in many ways do to the obvious reasons of core philosophy are non-business. Heavy reliance on volunteers and the perceived lack of funding which can be rolled back into the organization

## **Industry – web**

Few if any N.P.O.S have turned to the web for fund raising like the for profit world. Much of the limited use has been for promotion and not E-commerce. We have yet to find any service providers offering a “suite” of general E-solutions such as we are promising.

Although some sites are emerging in order to capture the donor dollar no sites seem to want to capture the community group itself (and then the E-commerce).

Our search of the industry is contained in appendix \_\_\_\_\_ a summary search of the search parameters is as follows:

Nearly every site which we believed could have been competitive has been visited and printed. See appendix \_\_\_\_\_.

In other words, we will offer:

1. A new (and in some ways better) meeting place and business tools:
  - a. Web Page
    - i. Permanent identity and coordination / meeting place (like a new phone number or store front but with lots more behind it.
  - b. Chat room

## **Notes:**

- A. Add ad book in process**
- B. Add web site**
- C. More than one printing/distribution**
- D. Add a “like” group, direct publication to subscribers – news letter, etc.,**
- E. Ad “work in progress” & contest tools such as “thermometer”**
- F. Add matching gifts**
- G. National fundraisers – which will be distributed “pro rata” per group (yours is 1 of 100 w 1.5% of total**

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**funds raised, with you receiving 1.5% of the matching gift allocated for the national fundraiser)**

**H. Public relations tools i.e. news – “HPHS Giants on Their Way to the State Championships” (to help go to \_\_\_\_\_. Idea)**

**I. Multi-year subscription/ future money upfront/cash flow/continuity**

**J. “Open Up So You Can See/Upgrade your ad versus your friends (on-line card calling/peer pressure)**

**K. Enter “community” names & get mailing lists. Enter community calendar & add friends & family birthdays, anniversaries, etc, memorial dates (founding, victory, Pastor’s) Link calendar with birthdays and e-retailers as a gift registry**

**a. Order on line**

**b. No duplicates in selections**

**c. No mall shopping**

**d. Send on line invitations**

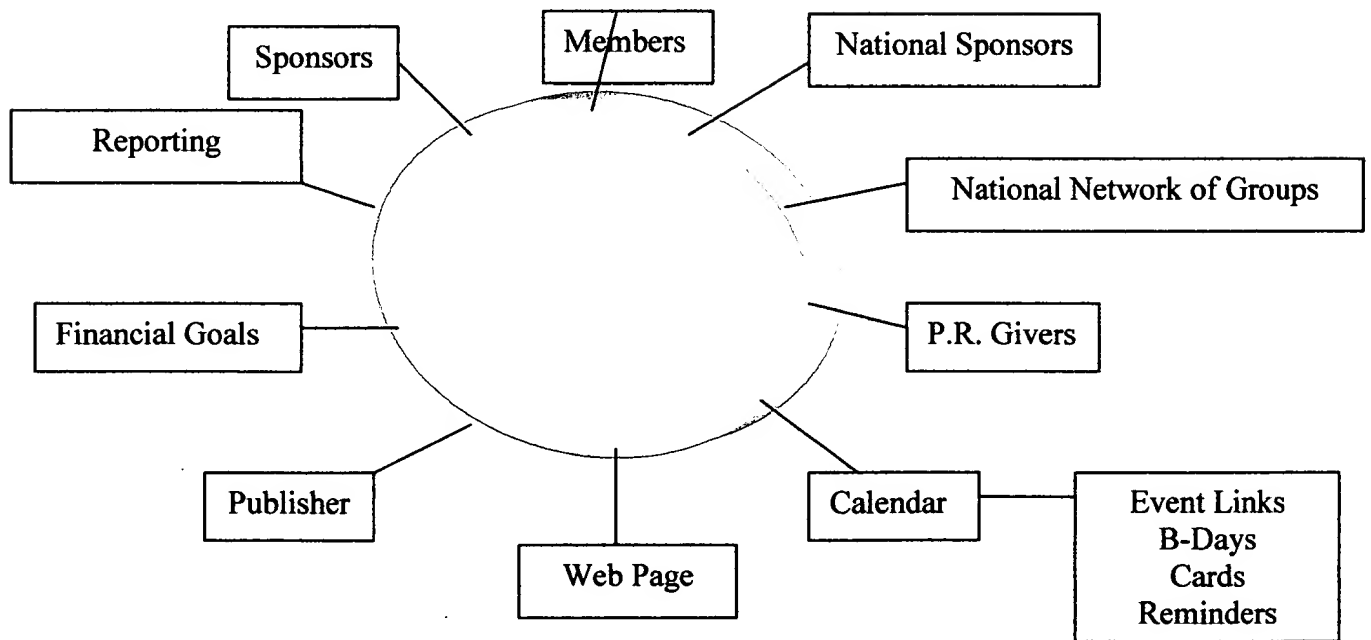
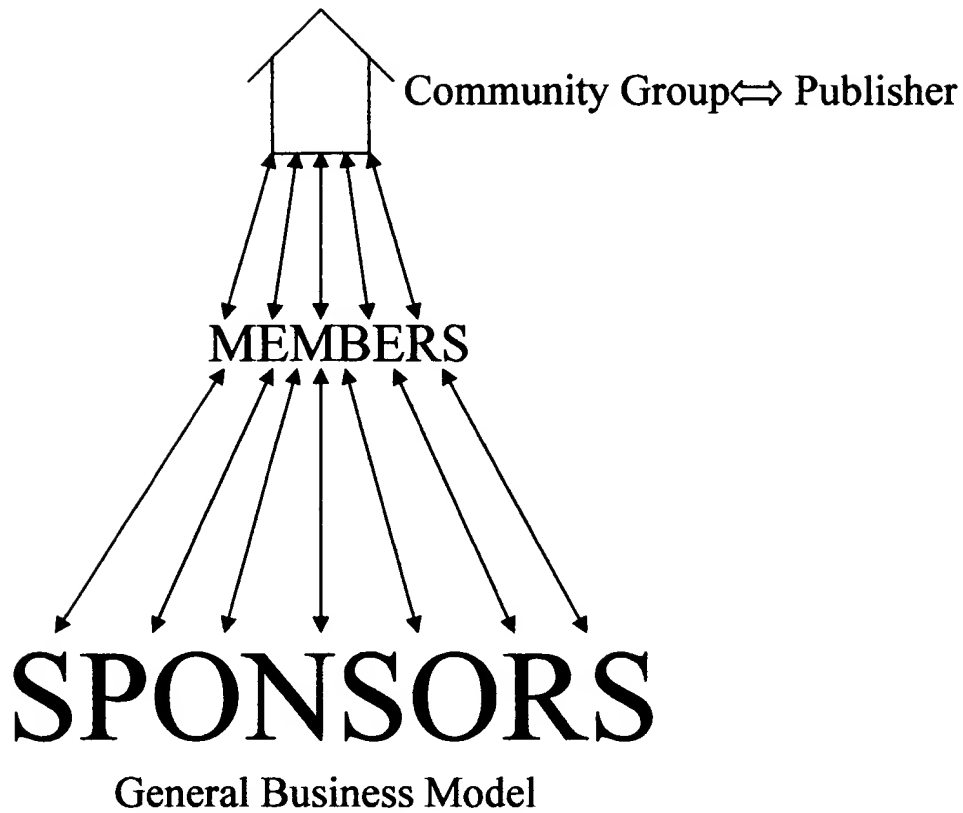
**L. Recipe book online**

**M. National ads sponsors**

**N. Puts sponsors names on web project**

**O. National “spokespersons” for campaigns that can be used for local level fundraising**

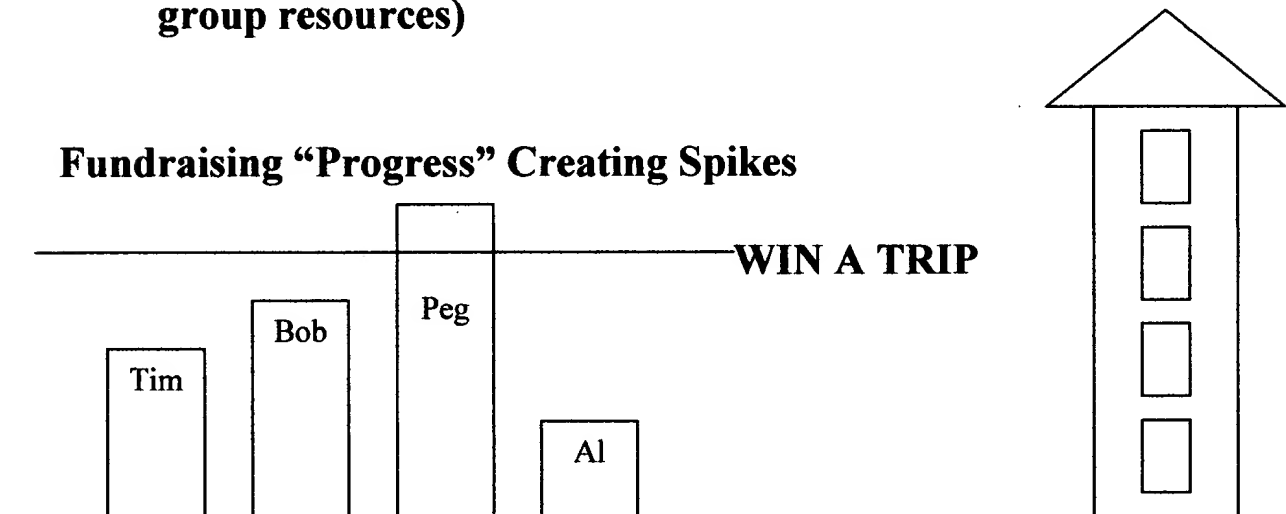
## Business Methods



## Ad Book.com Business Model

## **Marketing and Promotion**

- A. Via trade publications and charitable circles**
- B. Local community papers – charity announcements pages**
- C. Via out “subscribers” newsletters (they pay us/we pay them)**
- D. We give a free p.c. (\$500 value) for each group of over \_\_\_\_\_ people for them to automate their list and procedure (use to “capture” their market)**
- E. Create a “window of \_\_\_\_\_” of fundraising – Image of a Church group raising \$ via Net v. Door to Door v. Picnic v. Bake Off v. Recipe Book v. Professional Phone Bank (use web as a quilt to patch together community group resources)**



## **Building Fund Example**

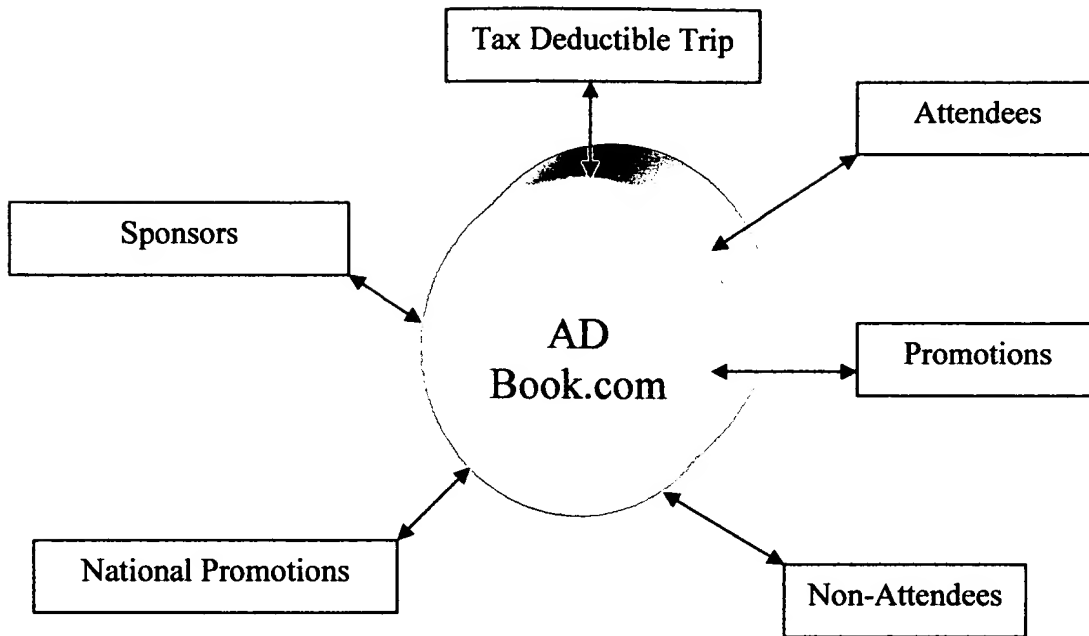
**Promote Committees or Key Workers with Recognition Programs and Promotional Gifts**

**Example (Raise \$10,000 and get a free trip to Vegas compliments of a matching sponsor like ATA and we link to the sponsor's web site)**

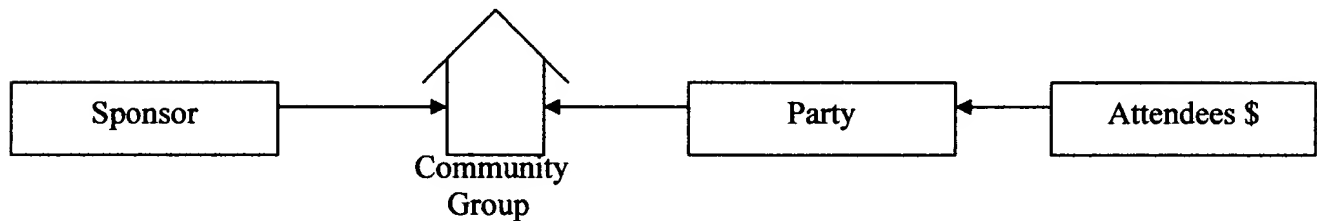
**Timing – On Line Auction with sponsor's gifts etc. similar to silent auctions with those who can't make it to a function.**

**Charity Auctions – Tax Deductible Gift in On Line Auctions for Tax Deductible Item Pay Group**

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Adbook.com Business Dynamic



Fund Raising Flowchart

### Comparison Between Methods of Creating an Ad Book

Old Practices	New Practices
Committees Call and Ask for Money Forms Collections Hand in Donations Process Groups Financial Accounting Products/Ads Send to Print (Delay in printing) Print Send to Group Members Distribute	<div data-bbox="829 1444 1317 1665"> <pre> graph TD             Members[Members] --&gt; PR[P.R.]             Members --&gt; NA[National Ads]             Call[Call] --&gt; PR             Call --&gt; NA             Mail[Mail] --&gt; PR             Mail --&gt; NA           </pre> </div> Online Forum Ad/Products Post Ad On Line Print or Multiple Print Messages E Mail to Group Books and News Goals Distribute Links to other resources

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The following are names which we own, are considering or may be taken and are coded as follows for each of the .com, .net and .org: G = we Got the name N/A-H = not available, held but not in use, N/A – C = not available and in use, A = Available but we may get

Names:	.com	.net.	.org
CharityGroup.com/net/org			
mycommunitygroup	G	G	G
yourcommunitygroup	G	G	G
charitygroup	G	G	G
communitygroup	N/A-C	G	G
onlineadbook	L	G	G
adbookassistant	G	G	G
adbookonline	G	G	G
adbookonlineassistant	G	G	G
adbook	N/A-C	N/A-C	G
communityadbook	G	G	G
groupadbook	G	G	G
churchadbook	A	A	A
schooladbook	G	G	G
associationadbook	A	A	A
adbookcalendar	A	A	A
adbookprinter	G	G	G
adbookprintsource	G	G	G
communityadvertiser	N/A-H	G	G
donorsforum	G	G	N/A-C

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foundationnation	G	G	G
communityauctioneer	G	G	G
donoronlineassistant	A	A	A
funddriveonline	A	A	A
onlinefunddrive	A	A	A
fundraiseronline	A	A	A
onlinefundraiser	N/A-C	A	A
silentcommunityauction	A	A	A
scoutcookies	A	A	A
subscriptiondrive	A	A	A
raffleonline	A	A	A
onlineraffle	N/A-H	N/A-H	N/A-H
raffle	N/A-C	N/A-H	N/A-C
charityexchange	N/A-H	A	A
charityfoundation	N/A-C	G	N/A-C
funddrive	N/A-C	A	A
groupcalendar	N/A-C	A	A
silentcharityauction	N/A-H	G	G
campagne	N/A-C	N/A-H	N/A-H
donornet	N/A-C	A	N/A-H
econtributor	N/A-C	N/A-H	N/A-H
essociation	N/A-C	N/A-C	N/A-C
givedirect	N/A-H	A	N/A-C

Business Plan V2  
 A2bookonline.com  
 File Found  
 Verified AS  
 2-28-2000  
 (B2)

Ad Book

Example

#4

From +/- 9/1999

(VARIOUS per web NAME)

BT

Bruce Fogelson



1	CA\LOTUS\WORK\123\WEB-NAME.WK4	Confidential				Confidential		10/11/99
2	Web Names List & Notes		W e b		Status	Legend:	G=Got! A=Available	
3						N/A- H=Held N/A- C=Comp		
4	ZMA, Inc.		Names					
5	Domain Name	.com	.net	.org	.Com. Ch.# Pd.	.Net. Ch.# Pd.	.Org. Ch.# Pd.	Sort
6	paramounthomes	G	N/A-H	G			Ch#8136 \$70.00 9/3/99	0.PH
7	ONLINEASSISTANT...							
8	onlineassistant	N/A-C	G	G	Comp	CC#052 \$ 70.00 9/22/99		1.10.OLA.1
9	onlineassistants	N/A-H	G	G				1.11.OLA.11
10	buyeronlineassistant	G	G	A	CC#052 \$ 70.00 9/22/99		CC#052 \$ 70.00 10/6/99	1.3.OLA
11	homeonlineassistant	G	G	A	9/27/99 My Domain	9/27/99 My Domain		1.41.OLA
12	newhomeonlineassistant	G	G	A	CC#052 \$ 70.00 9/22/99	CC#052 \$ 70.00 9/22/99		1.4.OLA
13	builderonlineassistant	G	G	A	CC#052 \$ 70.00 9/22/99	CC#052 \$ 70.00 9/22/99		1.5.OLA
14	extrasonlineassistant	G	G	A				1.6.OLA
15	donoronlineassistant	A	A	A				1.7.OLA
16								
17	ADBOOK.ORG							
18	adbook	N/A-C	N/A-C	G	Non-Comp	Non-Comp	CC#052 \$ 70.00 10/6/99	AD1.1
19	adbookonline	G	G	G	9/29/99 Domain Valet	9/29/99 Domain Valet	9/29/99 Domain Valet	AD1.11
20	onlineadbook	G	G	G	9/28/99 My Domain	9/28/99 My Domain	9/28/99 My Domain	AD1.114
21	adbookassistant	G	G	G	9/28/99 My Domain	9/28/99 My Domain	9/28/99 My Domain	AD1.15
22	adbookonlineassistant	G	G	G	10/8/99 Domain Valet	10/8/99 Domain Valet	10/8/99 Domain Valet	AD1.2
23	groupadbook	G	G	G	9/29/99 Domain Valet	9/29/99 Domain Valet	9/29/99 Domain Valet	AD1.25
24	communityadbook	G	G	G	9/28/99 My Domain	9/28/99 My Domain	9/28/99 My Domain	AD1.26